



**Iowa Retirement Investors' Club (RIC)**  
**457/401a Plans**  
Look forward to retirement!

## Denison Municipal Utilities RIC Account Form



### Personal Information

Name \_\_\_\_\_ Social Security # \_\_\_\_\_  
Last First MI Existing accounts use last 4 digits only

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Birth Date \_\_\_\_\_ Phone (work) \_\_\_\_\_ Phone (home) \_\_\_\_\_

### 457 Payroll Deduction Election

*Changes affect the 1<sup>st</sup> available check of the month following receipt of this form unless a later date is indicated. Stop requests are immediate.*

The combined amount of all 457 pretax and Roth contributions in a tax year is limited to the IRS annually declared maximum contribution limits (see <https://das.iowa.gov/RIC/PSE/contributions>).

#### Deduction amount

#### MassMutual

Pretax \$ \_\_\_\_\_

Roth \$ \_\_\_\_\_

☐ Stop deductions

#### Future effective date (if desired)

☐ Begin as of \_\_\_\_\_

### Participant Signature

I authorize my employer to process these requests. I have access and agree to the terms and conditions of the Iowa Retirement Investors' Club (RIC) as disclosed in the Plan Document. I have established 457 and 401a accounts with a RIC provider. I understand that the total of all 457 contributions made in the calendar year must not exceed the federal limits as required by the Internal Revenue Code section 457. I understand that withdrawals may only be made upon termination of employment or qualification for an in-service distribution.

**X**

Participant Signature

Date

### Form Submission

#### New accounts:

Provider account forms: Forward to the provider

RIC Account Form: Forward to your payroll office (shown below)

#### Existing account changes:

RIC Account Form: Forward to your payroll office (shown below)

### Agent Use Only

I am authorized to open accounts for this employee and verify that the participant has established 457/401a accounts with the provider shown below.

Print Agent Name

Agent Signature

Agent Phone Number

Provider Name

Date

#### Received by RIC

#### Payroll Office

#### RIC Use Only

Date Received: \_\_\_\_\_

Paycheck Effective Date: \_\_\_\_\_

Name: \_\_\_\_\_

Date Pended: \_\_\_\_\_

Entered: \_\_\_\_\_

Checked: \_\_\_\_\_



Visit the RIC website at <https://das.iowa.gov/RIC> and click on the Public Employees portal to access the RIC At-A-Glance (from Your Plan Details), IRS maximum contribution limits, and other plan options specific to your employer's 457/401a plans.

### Denison Municipal Utilities

721 Broadway ▪ Denison, IA 51442 ▪ (712) 263-4154 ▪ Fax (712) 263-8767

